### Demo: Order Collection from Community Zone

1. Search Community Zone for Electronic Collection: Electronic Collection Name contains “open access”
2. Find record: “Open Book Publishers: Open Access Books”
3. Row-action: Order
4. PO Type: “Recommended: Electronic Collection - Subscription”
5. PO Line Owner “Main Library”
6. Top-row action: Create PO Line
7. License: [show list, but don’t pick any]
   1. Could be different than Supplier or Provider below
8. Material Supplier: “ProQuest” (code = PRO) or vendor= PROQUEST
   1. Confusing in this context, but it’s the vendor you pay.
9. Access Provider: “ProQuest”
   1. Could be different than Material Supplier (vendor interface)
10. Discuss activation dates

Expected activation date= put in the date you expect the vendor to activate

Expected activation after order (days) = the number of days after ordering that you expect electronic orders to be activated (made available from vendor) + claiming grace period (ex: 5 + 2) = 7 days after ordering- claim is created.

E-activation due after ordering (days) - a reminder is sent to the Alma operator who has been assigned the activation task.

1. List Price: “$0.01”
2. Fund: “E: Humanities” “100%”
   1. Actually is a required field
3. Acquisition Method: “Purchase at Vendor System”
   1. Purchase = after POL is packaged and PO is approved –orders and renewals are sent to the vendor (EDI or email)
   2. Purchase at Vendor system = the purchase is handled at an external vendor system. PO lines are not sent to vendor- PO Lines are packaged and marked as sent until received (physical) or activated (electronic).
   3. Approval = identical workflow as purchase at vendor system- this is used as a reporting category for analytics.
   4. Technical = relevant for orders without inventory- can be used for multipart orders where a single payment is made and multiple items are received. Create a main POL/PO with fund information and then a technical POL/PO for each item that is received at a different time. In the end you will associate the technical POs with the main PO.
   5. Gift= the resources is a gift from a vendors
   6. Depository= institution agrees to host government publications and make the freely available.
   7. Exchange = Institution agrees to exchange resources with another institution
4. Reporting code: “Humanities: Electronic”
   1. There are three levels of reporting codes available for configuration.
   2. Primary, secondary and tertiary report codes for analytics reporting, ex: postage, or POL specific collections/inventory (Business/ Print) or Humanities/Electronic.
   3. Configure in Alma Configuration >Acquisitions> Purchase Orders> Reporting Codes, Secondary Reporting codes and Tertiary reporting codes table)
5. Renewal – Subscription Dates “May 1, 2018” to “April 30, 2019”
6. Renewal Date: “April 1, 2019”
7. Renewal Reminder Period: “30”
8. Top-Action: “Order Now”
   1. Order Now = POL is packaged into the PO is approved automatically.
   2. Save = POL information is saved & POL remains in review (ex: use this option to save the POL if assigning inventory manually- not relevant for e- resources but good to know.) Saving the POL allows you re-edit the PO Line before it is packaged into a PO.
   3. Save and Continue = POL information is saved (review rules are not checked) and PO moves to packaging stage.
   4. Defer = can be used for PO Lines in review and PO that haven’t been packaged yet. Both are held until they can be completed. PO line deferral reasons can be configured by an administrator on the Acquisitions Configuration menu such as 🡪 no fund exists, waiting for fund confirmation).
   5. Save and request evaluation = POL information is saved, use this option if you don’t have permissions to start a trial. The POL status changes to Under Evaluation and is moved to the manage trials page with a status of requested.
   6. Save and start a trial = if you have the trial operator or manager role you can start the trial. POL status changes to Under Evaluation, and the trials detail page opens.
   7. Cancel = the POL won’t be packaged- the POL is not removed from Alma and can be found using the POL search option.
   8. Delete- POL is removed from Alma.
   9. Save as Template- save as template (Choose a template in first step of POL creation)
   10. Change bib reference = (link a POL to a different Bib record- for example, if a bib record has been updated from brief to full and POL is still attached to the older (less complete bib, you can change it). \*\* For print- this doesn’t affect inventory attachment).
9. Search Institution Zone for Electronic Collection: Open Book Publishers

### Demo: Create Local Collection 1 – Portfolios

1. Resources Menu: Add Local Electronic Collection
2. Public Name: TechSem Portfolios Collection
3. Collection type: Selective package
4. Service type: Full Text
5. Top-row action: Save and continue
6. Service activation status: Available
7. Change tab: Service Description
8. Service type: Full Text
9. Change tab: Linking
10. Discuss Parser
    1. Parser = (destination: service) name of the target parser that creates the URLs such as a URL that goes to a publisher’s site
    2. Parser override= if you want to use different parser
    3. Parser Parameters= contains variables aka linking parameters such as article or relevant content from the Context Object.
    4. Parser parameters override- if an alternate is provided
    5. URL type (static links are great for linking to ebooks or databases. The static url is the target of the Alma u-resolver.
    6. Dynamic URL= A dynamic URL can use any value from the Alma context object and open url parameters to create a sophisticated url that functions like a search query. Dynamic URLs can be used to override linking provided by the community knowledge base as well.

(For more information about parsers see the following:)

\*\* [SFX Target and Alma E-Collection Configuration Guide](https://knowledge.exlibrisgroup.com/@api/deki/files/26602/SFX_Target_and_Alma_E-Collection_Configuration.pdf?revision=19)

1. Change tab: Portfolios
2. Tool: Load Portfolios
3. Select File (from hard drive): TechSem\_Local\_Collection\_Portfolios.xls
4. Loading Policy Type: CompleteI’ll
5. Record Format: MARC21 Bibliographic
6. Add local portfolios: Yes
7. Select Validation Policy: Validate online
8. Top-row action: Next
9. Top-row action: Load
10. (wait a minute for job to run)
11. Repository Search: Electronic Collection > Keywords > TechSem

### Demo: Create Local Collection 2 – Database

1. Resources Menu: Add Local Electronic Collection
2. Public Name: TechSem Database Collection
3. Collection type: Database
4. Service type: None
5. Top-row action: Save and continue
6. Change tab: Additional
7. Level URL: http://www.proquest.com/
8. Is free?: Free
9. Top-row action: Save
10. Repository Search: Electronic Collection > Keywords> TechSem Database Collection
11. Row-action: Order (show, but don’t select)
    1. Needed if you want to track expenses.
    2. You would do this even if you ordered it a long time ago.

### Demo: Create Local Standalone Portfolio

1. Resources Menu: Add Local Portfolio
2. Creation Type: Use an existing title
3. Record Type: One Time
4. Title: *Adventures in Raspberry Pi*
5. Portfolio Type: Standalone
6. Top-row action: Save and Done
7. Repository Search: Electronic Portfolio > Keywords> World journal of emergency surgery

To get a file to edit, you can edit (how to get an xls template to upload portfolios)

* Click “extended export” (.xls) of a specific collection in Alma
* Or, create a set of portfolios and export the content of the set using the “Export Electronic Portfolios” job

### Demo: Activation

1. Show (but don’t select) Resources Menu > Manage Electronic Resource Activation
2. Select Tasks > Electronic Resources – Activation – Assigned to Me
   1. Where is Open Book Publishers? Switch to Unassigned (may have to search that page).
3. Open Book Publishers: Open Access Books: Row-action: Activate
4. Activation Wizard starts (because this was a CZ resource)
   1. (If it had been a local collection, it would activate at this point!)
5. Mark Bib: Unsuppressed
6. Proxy: No
7. Activate this electronic service: Yes
8. Make service available: Yes
9. Automatically activate new portfolios: Yes
10. Active from date: May 1, 2018
11. Active until date: April 30, 2019
12. Top-row action: Next
13. Proxy enabled: No
14. Portfolios – Activation Type: Activate all
15. Activation Summary – top-row action: Activate
16. Admin Menu > Monitor Jobs - Wait for job to complete
17. Task List – Assigned to me – Open book publishers
18. Row-action: Edit Resource
19. Switch tab: Additional
20. Is free? Free
21. Services – Full Text – row-action: Edit
22. Service Activation Status: Available
23. Switch tab: Linking
24. Discuss Dynamic URL
    1. Specific to local electronic collections and portfolios- embed OpenURL metadata
    2. Dynamic URLs can also be used to override linking provided by the CZ.
25. Discuss Proxy Enabled (at this Service level)
    1. Hierarchy of which proxy is used- Collection, Service, Portofolio- a relatively simple but valuable concept - something that all customers should know.
    2. Note: A proxy added at Collection level doesn’t apply to portfolios. But a proxy added at the Service level does apply to portfolios, but not to Collection. Later today we’ll see how to find those kinds of proxy-broken issues
    3. Knowledge Base search for [“Proxy Relationships”](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/030Resource_Management/220Resolver_Proxies)
26. Top-row action: Save
27. Top-row action: Save (again)

### Demo: Test Access

1. Test Access tool only appears on Activation Tasks list, and when resource has either of the following:
   1. Bib record and URL associated with it; or
   2. Services associated with it.
2. Select Tasks > Electronic Resources – Activation – Assigned to Me
3. Open Book Publishers: Open Access Books: Row-action: Test Access
   1. If action is not available, Create E-Activation Task
4. On one of the portfolios: Row-action: Test Access
5. Online Services page: Display in new window
6. Click the link to full text (to make sure it works)
   1. If it doesn’t work, you can do some troubleshooting, as follows.
7. Switch back to the previous browser tab.
8. Right-click anywhere on the page (except on a hyperlink): View the page source
   1. Or view frame source. The options are somewhat different for each browser.
9. In the DEBUG section at the top: Copy the URL
10. Open a new browser page or tab, paste the DEBUG URL you just copied and press Enter on your keyboard.
11. The XML appears, starting with the <context object> element. This lets you see:

* Which target parser was used?
* Was a proxy used?
* Was it a static URL on the portfolio level?
* Is there a direct link?
* View the generated target URL.
* Context objects can be used as parser / linking parameter when creating dynamic URLS.

### Demo: Finalize Activation

1. Task List for item that needs final activation
2. Suppress or unsuppress bib record
3. Additional tab: Services – Full text: Row-action: Activate
4. Back to task list: Row-action: Done

### Demo: Set Up a Trial

1. Search Community Zone for Electronic Collection: ProQuest Military Newsstream
2. Row-action: “Order”
3. Do a quick PO Line as usual, with random entries in required fields, except don’t “Order Now”
4. Top-row action: “Save and Start Trial”
5. Now on the Trial Details page
6. Start Date: April 30, 2018
7. End Date: May 31, 2018
8. Note “Available to Public,” but don’t select it.
9. Top-row action: “Save and Continue”
10. Switch tab: Survey Form
11. General Information: Add question
    1. Group: Content
    2. Type: Yes or No
    3. Question: “Is the content appropriate?”
    4. Select: Add and close
12. Switch Tab: Participants
13. Tool: Select Participants
14. Add a couple of participants
15. Top-row action: Save
16. On Manage Trials page: Row-action: Activate
    1. Mark bib as suppressed
    2. Activate Service
    3. **Don’t** make service Available!
17. Later: Read Analysis

### Demo: Overlap Analysis Reports

1. Menu: Resources > Overlap and Collection Analysis
2. Tool: Submit New Report
3. Source Electronic Collection (from IZ): Keywords: Free E- Journals
4. Target Electronic Collection (IZ or CZ): CZ: ProQuest U.S. Newsstream
5. Match Method: ISSN
6. Use Date Coverage: Yes
7. Top-row action: Submit
8. Menu: Admin > Monitor Jobs
   1. Takes about 4 minutes to run
9. Menu: Resources > Overlap and Collection Analysis
10. Row-action: View
11. Click one of the reports to download Excel file.

Alma Overlap Analysis tool enables you to compare the content of electronic collections to determine where there may be a subscription overlap. Overlap Analysis tool can be used when making acquisitions decisions for electronic collections.

* Use this to compare the content of electronic collections and from results decide where there is overlap.
* If collection/titles are included in one or more other different collections then perhaps they/it can be cancelled / not renewed

The results will potentially give four reports:

* Complete Overlap Report

Contains matching titles with identical coverage dates.

* Partial Overlap Report

Contains matching titles with partially overlapping coverage dates.

* Title Overlap Report

Contains matching titles with mutually exclusive coverage dates.

* Unique Titles Report

Contains titles that are unique to the source set you created for the comparison.